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**From:** Bussard, David [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=CF26B876393E44F38BDD06DB02DBBFE5-BUSSARD, DAVID]  
**Sent:** 11/11/2016 2:59:56 PM  
**To:** Soto, Vicki [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=a960b18ed5c440d69eb9db21b8565f97-Soto, Vicki]  
**CC:** D'Amico, Louis [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=78a91f83c4414910be286efe02004dbc-D'Amico, Louis J.]; Perovich, Gina [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=6e3c19d7f4db41bfa2477aa27ad83945-Perovich, Gina]; Cogliano, Vincent [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=51f2736376ac4d32bad2fe7cfef2886b-Cogliano, Vincent]; Ross, Mary [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=98359cd1f66f46ec91d327e99a3c6909-Ross, Mary]; Jones, Samantha [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=eac77fe3b20c4667b8c534c90c15a830-Jones, Samantha]; Avery, James [/o=ExchangeLabs/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=b0fc9e70467647709fa9377dfb987f10-Avery, James]  
**Subject:** Re: some comments

thanks Vicki

I was not thinking of the resources report as something people might tailor to fit their needs.

I was thinking only of the meeting minutes form.

David Bussard  
Sent from my iPhone

On Nov 10, 2016, at 9:15 AM, Soto, Vicki <[Soto.Vicki@epa.gov](mailto:Soto.Vicki@epa.gov)> wrote:

Hi David,  
I will work with David and Simone on your comments – they seem pretty straightforward and easy to implement.

When you talk about modifying, I am thinking that you mean the meeting agenda and minutes template? All of the tools we talked about yesterday will be available on the SharePoint site. It won't be possible for users to edit documents on the site (only Dahnish, David, Simone, and I have editing rights).

1. <!--[if !supportLists]--><!--[endif]-->For the meeting agenda template – I think that staff will be able to download the template and they can modify it to fit their needs. I don't think that they will need every section for every meeting. The important thing is to promote the use of this tool in general in order to share information and save it for future reference.
2. <!--[if !supportLists]--><!--[endif]-->For the meeting checklist, we will be able to tell everyone that they are welcome to comment/suggest edits. Simone/David can update and repost.
3. <!--[if !supportLists]--><!--[endif]-->For the resources report – this is a little bit trickier. A version will be available, but the master will be kept by Dahnish and I. There will have to be a process where Dahnish and I check in with the BC to gather any changes. I expect that we will update this weekly and post new versions of it to the SharePoint site.

Vicki

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**From:** Bussard, David  
**Sent:** Thursday, November 10, 2016 7:42 AM  
**To:** Soto, Vicki <Soto.Vicki@epa.gov>; D'Amico, Louis <DAmico.Louis@epa.gov>; Perovich, Gina <Perovich.Gina@epa.gov>; Cogliano, Vincent <cogliano.vincent@epa.gov>  
**Subject:** RE: some comments

One other thought:

When we roll these out, I anticipate we'll be asked if people can modify this if slight modifications would better serve their needs.

My view would be that while we encourage people to try it as is, we are also fine with them modifying it if they want. That reduces any grumbling that it is not quite what they want to do, and would also allow for feedback as to what kinds of changes people tried and if they worked well for them.

David

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**From:** Soto, Vicki  
**Sent:** Wednesday, November 09, 2016 5:11 PM  
**To:** Bussard, David <Bussard.David@epa.gov>; D'Amico, Louis <DAmico.Louis@epa.gov>; Perovich, Gina <Perovich.Gina@epa.gov>; Cogliano, Vincent <cogliano.vincent@epa.gov>  
**Subject:** RE: some comments

Thank you for your comments David!

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**From:** Bussard, David  
**Sent:** Wednesday, November 09, 2016 5:02 PM  
**To:** Soto, Vicki <Soto.Vicki@epa.gov>; D'Amico, Louis <DAmico.Louis@epa.gov>; Perovich, Gina <Perovich.Gina@epa.gov>; Cogliano, Vincent <cogliano.vincent@epa.gov>  
**Subject:** some comments

Overall, nice job! Using these as is would allow us to move forward and get some experience.

One change I would like right away, however, is to add a "Version" or "Date" cell on the Staffing Planner, so I know when the data I am looking at was last updated.

I also have some other thoughts, I'll put below. Likely none of them are things I think we "must do", but are reactions from someone looking at these for the first time.

David

#### DECISION TRACKER

- <!--[if !supportLists]--><!--[endif]-->Great. Looks good. No suggestions for revision.

#### IRIS PROGRAM STAFFING PLANNER

- <!--[if !supportLists]--><!--[endif]-->I like the simple visual display, and let's try it.

- <!--[if !supportLists]--><!--[endif]-->A simple recommendation: **add a “Version from [date]” cell at the top.** I’d want it visible when I look at this on-line as well as printing if I print a copy.
  - <!--[if !supportLists]--><!--[endif]-->Otherwise, I think we’ll find people comparing different versions or any of us who use a hardcopy version will lose track of which version we have.
- <!--[if !supportLists]--><!--[endif]-->If you could.... I don’t know if this can be easily added, but visually it would be neat if there was a vertical line that was always at the date of the last update.
  - <!--[if !supportLists]--><!--[endif]-->But, I would not know how to do that in Excel and I would not delay roll-out for that.
  - <!--[if !supportLists]--><!--[endif]-->I’m thinking what would be neat is that anything to the left of that line would hopefully be “actual” time spent; and anything to the right would be “projections”.
- <!--[if !supportLists]--><!--[endif]-->I like the idea of a change log tab. I don’t know how one would then organize the sheet on that tab. For simplicity, perhaps it is just a chronological record of changes.
- <!--[if !supportLists]--><!--[endif]-->I like the idea of also noting if someone got pulled off onto some non-IRIS work, what it was they were asked to do instead (e.g, glyphosate).

#### MEETING CHECKLIST

- <!--[if !supportLists]--><!--[endif]-->I also like this.
- <!--[if !supportLists]--><!--[endif]-->Some suggestion to consider:
  - <!--[if !supportLists]--><!--[endif]-->I would consider putting “meeting objectives” before “participants”. I would think about objectives before I would know who had to participate. (I may also do that no matter what order they are in on the form.)
  - <!--[if !supportLists]--><!--[endif]-->I love the idea of including a space to write down the “parking lot” issues. I have not seen that before and it should give some comfort to those who raised an issue and saw it “parked”.

## MEETING CHECKLIST

- <!--[if !supportLists]--><!--[endif]-->Again, I like it.
- <!--[if !supportLists]--><!--[endif]-->Few suggestions to consider, but we can use it as is first if you want:
  - <!--[if !supportLists]--><!--[endif]-->Again, I might put “establish objectives” before “identify participants”, so that I am using the objectives to let me think through who needs to participate in order to meet that objective.
  - <!--[if !supportLists]--><!--[endif]-->Re “Contact meeting participants in advance:”
    - <!--[if !supportLists]--><!--[endif]-->A good step to have. Nice.
    - <!--[if !supportLists]--><!--[endif]-->Could we have a preceding step of sending out meeting objectives and, where possible, a draft agenda? (I’m not sure how I would ask for questions from participants about what is being covered if I have not sent something out?)
  - <!--[if !supportLists]--><!--[endif]-->Re “Premeeting communications”:
    - <!--[if !supportLists]--><!--[endif]-->“Distribute meeting ground rules.” This made more sense once I saw the sort of “standard” meeting ground rules. If we have a standard list of rules, do we really need to send it out each time? Maybe for awhile? But, eventually, maybe not, or only if differing from the standard rules?
    - <!--[if !supportLists]--><!--[endif]-->Materials in advance: hurray!
    - <!--[if !supportLists]--><!--[endif]-->“Expected output” – that may work. I have found it clarifies my thinking to also ask myself specifically “What decisions do I need, if any?” That could be how I interpret “expected output”, or it might help others to specifically add the question of what decisions, if any, are needed.
    - <!--[if !supportLists]--><!--[endif]-->I would consider adding to the “Pre-meeting tasks” identifying a note-taker in advance. That can save time and increase the odds that someone is identified. It also saves time in the group.
  - <!--[if !supportLists]--><!--[endif]-->During meeting:
    - <!--[if !supportLists]--><!--[endif]-->As noted above, I would consider adding to the “Pre-meeting tasks” identifying a note-taker in advance. That can save time and increase the odds that someone is identified. It also saves time in the group. Then, in the meeting, “Confirm a note-taker has been identified.”
    - <!--[if !supportLists]--><!--[endif]-->A bigger issue,... but, groups will not always reach consensus. I would like a bullet on what to do if consensus is not reached, and something more concrete than “hold another meeting”. What could we say: “If consensus is not reached, record the key competing views and what the next step will be to get the issue resolved.” ?

- <!--[if !supportLists]--><!--[endif]-->Last bullet: minor. I might delete "IRIS" in last "thank you" bullet. Then the template could be used more widely across NCEA if people like it.